

The Commonwealth of Massachusetts

State Library of Massachusetts
State House, Boston

95th

ANNUAL REPORT



Massachusetts Board of Library Commissioners

July 1, 1983 to June 30, 1984

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1983/84
c. 2



**Ninety-fifth Annual Report
of the
Massachusetts Board of Library Commissioners
Commonwealth of Massachusetts**

Fiscal Year 1984

July 1, 1983 to June 30, 1984

648 Beacon Street
Boston, Massachusetts 02215
(617) 267-9400
800-952-7403 (in-state)

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1983-1984

BOARD OF LIBRARY COMMISSIONERS

Term

1978 - 1983	IRENE E. PODGER, Wellesley, <i>Chairman</i>
1978 - 1983	SAMUEL SASS, Pittsfield, <i>Vice-chairman</i>
1978 - 1983	JOAN ROSNER, South Hadley, <i>Secretary</i>
1983 - 1984	DONALD CRONIN, Shrewsbury
1981 - 1986	MARTHA G. EDMONDSON, Brookline
1981 - 1985	RICHARD J. MCCARTHY, Esq., Swampscott
1978 - 1983	MARGARET MULLIN, Osterville
1978 - 1983	JAMES RYDER, Concord, to 8/83

PROFESSIONAL STAFF

Director	Roland R. Piggford
Assistant to Director	Owen Smith
Business/Personnel Manager	Irene S. Levitt
Head, Library Development and LSCA Project Director	Mary M. Burgarella
Consultant for the Blind and Physically Handicapped	Ann Montgomery Smith (to 7/28/83) Sarah K. Person (from 1/1/84)
Consultant for Services to the Disadvantaged	Christine L. Kirby (to 11/30/83) Shelley Quezada (from 4/8/84)
Consultant for the Institutionalized ...	Linda A. Wright
Coordinator, Non-Print Media Services	Louise A. Kanus
Audiovisual Technician	Richard Taplin
Library Information Specialist	Phyllis Melchionna (from 7/31/83)
Head, Planning and Research	Robert Dugan
Planning and Research Specialist	Mary A. Litterst
Automation Consultant	Susan N. Bjorner
Programmer	Lisa Keller (to 3/30/84) Manjeri Kulatilaka (from 4/29/84)
Coordinator, Library Incentive Grants and Certification	Janet Price
Coordinator, Professional Information Services	Catherine R. McCarthy
Technical Services Librarian	Saundra J. Haley
Reference Librarian	Brian R. Donoghue
Consultant for Library Construction	Thomas Ploeg

FINANCIAL STATEMENT

COMMONWEALTH OF MASSACHUSETTS IN ACCOUNT WITH THE BOARD OF LIBRARY COMMISSIONERS

JULY 1, 1983 - JUNE 30, 1984

Account Number 7000-9101

Appropriation for the Board of Library Commissioners

Personal Services	\$290,835.00
Expenses	134,217.00
TOTAL	425,052.00

Expenditures

Personal Services	\$280,407.81
Expenses:	
Electricity	\$ 6,032.00
Travel	8,385.13
Printing/Binding	4,009.00
Office Repairs & Replacements	6,420.00
Books & Related Materials	18,000.00
Office Administration Expenses	26,916.66
Rentals	64,419.00
Expenses Sub-Total	\$134,181.79
Total	\$414,589.60
Unexpended Balance	\$ 10,462.40

Respectfully submitted,
Roland R. Piggford, Director
Board of Library Commissioners

Financial statement verified
August 30, 1985
by William J. Walsh
for Ellen M. O'Connor, Comptroller

FISCAL 1984 STATISTICAL SUMMARY

Appropriations and Allotments

State Appropriation for Board Administration	\$ 425,052
State Aid for Regional Public Library Systems	5,817,341
State Aid to Public Libraries	2,890,260
State Funds Sub-total	9,132,653
Federal Funds Allotment for LSCA-Title I	1,548,267
Federal Funds Allotment for LSCA-Title II	0
Federal Funds Allotment for LSCA-Title III	358,974
Federal Funds Sub-total	1,907,241
Grand Total State and Federal Funds	\$11,039,894

Staff (FTE Positions)

Filled Positions:

Professional	19
Subprofessional and Clerical	12
TOTAL	31

Certification ActivitiesNumber

Professional, on basis of graduation from	
ALA-accredited library school program	33
Professional, via exam (no exam during FY84)	0
Professional, issued on basis of reciprocity	0
Subprofessional	92
Provisional subprofessional	81
Replacements	3
TOTAL	209

AGENCY PUBLICATIONS and PRODUCTIONS

MBLC Notes 9 issues
periodic newsletter reviewing actions taken at meetings of the Board of Library Commissioners; includes timely announcements and articles of general interest to the Massachusetts library community.

Massachusetts Position Vacancies 12 issues
monthly listing of vacant professional library and information science positions available in the Commonwealth.

LSCA Title I Special Projects Reports 1981
descriptive report of LSCA Title I grant projects.

Data for Massachusetts: FY1983 Comparative Public Library Report
a statistical report prepared by the Planning and Research Unit; enables rapid comparison of financial support and activity levels among Massachusetts public libraries.

Data for Massachusetts: 1983 Public Library Personnel Report
compiled by the Planning and Research Unit to report staffing levels, salaries, education levels, and fringe benefit data of Massachusetts public library personnel as of 7/1/83.

Long Range Program for Library Development: Linking Informational Needs, 1983 Supplement
annual update for the Massachusetts Long Range Program for Library Development.

Ninety-third Annual Report of the Board of Library Commissioners
Board's report to the Governor of the Commonwealth.

Massachusetts Standards for Patients' Library Service
quantitative standards adopted by the Board for library service to hospitalized patients.

Proper Care and Maintenance of Your 16mm Projector
a slide-tape production, 18 mins. color; discussion of different types of 16mm projectors, the common problems associated with them and how to rectify these problems; includes step-by-step instructions on how to clean the projector and perform general preventive maintenance.

Automated Resource Sharing in Massachusetts: A Plan
a conceptual framework for the structure and activities of a multitype resource-sharing library network utilizing automated technologies.

ANNUAL REPORT

BOARD OF LIBRARY COMMISSIONERS

Year ending June 30, 1984

DIRECTOR'S REPORT

As fiscal year 1984 drew to a close, it became obvious that intensive lobbying on the part of the Massachusetts Library Association, the Massachusetts Library Trustees Association, members of the Regional Library Systems and library friends and users throughout the Commonwealth would culminate in a substantial increase in state funding for the Regional Library Systems. This turned out to be the case. The state budget for FY1985 provided an increase from \$3,746,270 to \$6,189,159 (65%) for the coming year, excluding Library of Last Recourse funds. After a decade and a half of virtual level funding, it is remarkable that the Systems have survived, given the exponential increase in library materials costs over that period. In point of fact, they may well not have remained viable without this increase in budget.

Those responsible for this victory deserve our thanks: the library employees, the trustees, library users and library supporters in the Administration and the General Court. For the first time in their history, the Regional Systems are funded to achieve their full service potential.

Perhaps we may now be able to turn this advocacy coalition in other directions to support other funding and program needs that would benefit a statewide clientele. Such needs might well arise from a study of the present structure of state aid to public libraries in Massachusetts, that is, the "Library Incentive Grants" authorized under Chapter 78, Sections 19A and B of the General Laws. Is this state aid structure, conceived in the 1960s, still relevant in the fiscal, professional and technological climate of the 1980s?

The following general categories of state aid to municipalities for public library support lend themselves to definition in terms of purpose:

- 1) *Egalitarian Aid* — Monies distributed on an equal *per capita* basis, without regard to eligibility standards, the purpose being to benefit each individual in an equal and unbiased manner.
- 2) *Equalization (or Compensatory) Aid* — In most instances, formula distributions intended to compensate for disparities in municipal financial resources.
- 3) *Incentive Aid* — Distributions which, through the application of standards of eligibility, seek to stimulate adequate, if not increased, local support of library service.

To a considerable degree, these purposes are mutually antithetical. It must also be accepted that the pure realization of these purposes is inhibited if statutory conditions permit municipalities to use these distributions to reduce tax rates rather than supplement local library funds.

In some instances, the statutes set forth the purpose(s) of a state aid program; i.e., Chapter 70, Sec. 1, MGL, authorizing school aid:

"The purpose of the financial assistance provided by this chapter shall be to promote the equalization of educational opportunity in the public schools of the commonwealth, to reduce the reliance upon the local property tax in financing public schools, and to promote the equalization of the burden of the cost of school support to the respective cities, towns, regional school districts and independent vocational schools."

The purpose of state aid to public libraries in Massachusetts is put in much more general terms (Chapter 70, Sec. 19):

"The board of library commissioners may spend such sums as may be appropriated for the extension and encouragement of library services within the commonwealth."

This is the purpose that could be advanced through equal *per capita* grants, equalization grants or incentive grants. However, the mechanics of approval and distribution mandated for library aid under Sections 19A and 19B make it clear that the more specific purpose of the appropriation authorized under Section 19A is to serve as an incentive to local effort. This is the only purpose implied by the statutes. Essentially, we take a one-dimensional approach.*

To further elaborate on these general state aid categories:

Egalitarian (Statewide *per capita*) Aid

Such aid is easy to administer and may be politically expedient. It gives something to everyone. However, it provides no incentive to improved local effort, inasmuch as there are no fiscal or performance standards for eligibility. Neither is it, strictly speaking, compensatory: the amounts of local distributions are not conditioned by local tax bases, personal income levels, etc. It is neither "discriminatory" nor "discriminating"; i.e., in terms of aid to public libraries, it does not deny aid to municipalities unable to support adequate public library service, but neither does it differentiate between municipalities *unable* to provide such support and municipalities *unwilling* to provide it.

Equalization Aid (Compensatory Aid)

Many direct state aid programs in Massachusetts incorporate formula elements that recognize the disparity in financial resources among the cities and towns. In fact, a continuing effort to reduce those disparities has characterized state aid reform over the past 15 years. There has been a distinct trend nationally toward incorporation of compensatory or equalization formulas into library aid programs. This is not to imply that we in Massachusetts must follow that trend, but we should have good reasons for not doing so. The trend toward compensatory library aid may be largely "fallout" from the legal issue of equality of resources supporting public education units. If this is the case, it may be a comparison of apples and oranges.

*For FY1984, budget language has provided for the distribution of "Supplemental State Aid to Libraries" in the amount of \$1,500,000 to be distributed on a per capita basis to all municipalities excluding Boston. However, this distribution has no statutory sanction, can be withdrawn at any time, and has been appropriated locally for library purposes in less than 25% of the cities and town of the Commonwealth.

There are many reasons why the equalization of public education support is a more clear cut concept than the equalization of public library support:

- 1) Public education is a mandate. Public library service is not, and municipalities have the option to discontinue these services.
- 2) The statistic of "per student expenditure," basic to education funding formulas as a measure of inequality, is generally more valid than any unit measure that could be developed for public library expenditures. Public education serves a finite, controlled clientele, while public libraries serve a very indefinite and independently motivated clientele.
- 3) The development of equalization formulas for school aid was preceded by a period of consolidation of administrative units into districts of a size sufficient to offer the theoretical possibility of equal resources and services. The consolidation or federation of local library jurisdictions has been less common.
- 4) Equalization formulas for library aid tend to include relatively few factors in comparison with equalization formulas for school aid. Most library formulas seem to incorporate not more than 3 of the following 4 factors - sometimes less:
 - a) equalized valuation of taxable property in the library's service area in relation to statewide valuation
 - b) a library support figure for the service area in relation to a statewide library support figure
 - c) population of the service area
 - d) square miles in the service area.

On the other hand, school aid formulas are often weighted for such relevant factors as the special needs of the economically underprivileged and the varying costs of programs.

The economics of government come into play here. State Education Departments have planning and research personnel in sufficient numbers to develop, implement and monitor complex compensatory aid programs. Generally speaking, State Library Agencies do not. However, a modest increase in administrative expenditures would permit us to develop and administer a relatively uncomplicated equalization aid formula. If we did so, we would be in the mainstream of local aid philosophy.

Incentive Aid

Such aid provides for the distribution of funds to libraries (or municipalities) meeting statutory or regulatory standards that are (a) quantitative, or (b) simply matters of compliance/non-compliance. Current Massachusetts state aid authorized under Ch.78, Sections 19A and B, is incentive aid, with distribution on a *per capita* basis (except for municipalities of under 2,500 population).

Our existing quantitative standards include the requirement that the municipal appropriation not be less than the average of the 4 preceding years, the materials expenditure standards, and the requirement that libraries be open a certain number of hours.

- There are other quantitative standards that could be established, such as a municipal appropriation based on a required *per capita* figure, library expenditure as a minimum percentage of municipal expenditure, etc. Quantitative standards could be measurable on an ordinal scale (eligibility based upon some position in a rank order distribution), or they could require that some specific library fiscal or activity indicator exceed the mean, the median or some other percentile or index value.

Compliance standards should be verifiable in terms of a simple yes/no response not involving any routine record keeping or mathematical calculations. Existing compliance standards include the "free access" requirement, participation in the reciprocal borrowing program, and educational qualifications for the director.

- There are many other standards that could be formulated; i.e., the library shall have conducted a community needs analysis within the previous "x" number of years; the library shall formulate annual goals and objectives; the library shall develop performance measures for periodic evaluation of services; the library participates in a regional cooperative or a computer-based resource sharing network, etc.

Recent nationwide trends in state library aid have been summarized in the July 18, 1983 issue of *LJ Hotline*, reporting on an ALA conference program on state aid:

"TRENDS IN STATE AID 1983: Bob Clark, Director of the Oklahoma Department of Libraries, provided a wrapup of the major trends discerned in state aid by a recent survey. Some 1000 persons attended the program on state aid sponsored by PLA, COSLA, and ULC (Public Library Association, Chief Officers of State Library Agencies, and Urban Libraries Council); they heard that state aid has been steadily increasing since 1965, but that most states still provide less than \$1 *per capita*. The means of administering state aid programs and even the agencies with responsibility for the funds involved show great diversity. The trend today is away from *per capita* grants, and toward a mix of basic grants, equalization aid, and other factors, such as square miles of service area and local effort (emphasis added)."

Other states seem to have recognized that one of the common purposes of all state library agencies, the improvement of statewide public library services, cannot be adequately addressed by a one-dimensional distribution of state aid funds. The Board of Library Commissioners and its staff have spent countless hours over the past few years trying to provide "compensatory" or "non-discriminatory" state aid to municipalities unable to meet eligibility standards. We have tried to do this by manipulating the statutory and regulatory structure of the existing "incentive" grant program that was created for a totally antithetical purpose. Perhaps it is time for us to rethink our state aid philosophy, define our purposes as we now see them and propose such legislative amendments as might be indicated.

Roland R. Piggford
Director

COMMITTEES

Representatives from all types of libraries and user groups served on various standing and *ad hoc* advisory committees established by the Board to provide insight and assistance with matters concerning the improvement of library services in the state. Their efforts deserve recognition and appreciation.

Statewide Advisory Council on Libraries

Richard Gladstone, Town Manager Methuen Town Hall, <i>Chairman</i>	Users
Mary Burgarella Board of Library Commissioners	BLC Staff Liaison
Richard Ferguson, Jr., President Applied Information & Science Technology	Users
Brenda Gadson Department of Correction	Disadvantaged Users
Stanley Haney, Director Westborough Public Library	Public Libraries
Bonnie Isman, Director Jones Library, Amherst	Public Libraries
Patricia Kirk, Librarian Regional Library for Blind & Physically Handicapped	Libraries Serving the Handicapped
Colin McKirdy, Librarian Wessell Library, Tufts Universtiy	Academic Libraries
Jane Ouderkirk, Director West Bridgewater Public Library	Public Libraries
Paula Polk Worcester	Users
Sandra Souza Mass. Department of Correction	Institutions
Janet Sprague, Librarian Vernon Hill School, Worcester	School Libraries
Judith A. Weinberg, Librarian Abt Associates, Inc.	Special Libraries

Advisory Committee on Certification of Librarians

Robert L. Rice, Levi Heywood Memorial Library, Gardner, *Chairman*
Mark Mancevice, New England Telephone Company
Janet Price, Board of Library Commissioners Staff Liaison
N. Janeen Resnick, Western Massachusetts Regional Library System
Samuel Sass, Board of Library Commissioners Liaison

Automation Planning Committee

Robert Dugan, *Chair*, Massachusetts Board of Library Commissioners
Sherrie Bergman, Wheaton College Library
Ben Hopkins, Massachusetts College of Art
Jack Hall, Greater Lowell Regional Vocational School
Jane Katayama, MIT Lincoln Laboratory
Robert Maier, Bedford Free Public Library
Susan Bjorner, *Secretary*, Massachusetts Board of Library Commissioners

Network Advisory Committee

Diane Baden	Wellesley-Lexington Cooperating Libraries
Bruce Baker	Western Massachusetts Regional Library System
Susan Bjorner	Board of Library Commissioners
William Boyle	Southeastern Massachusetts Cooperating Libraries
Gai Carpenter	Hampshire Inter-Library Cooperative/Five Colleges
Howard Curtis	Merrimac Inter-Library Cooperative
Robert Dugan	Board of Library Commissioners
Marge Fischer	Central Massachusetts Regional Library System/Automation Committee
Sharon Gilley	North of Boston Library Exchange
Mary A. Heneghan	Eastern Massachusetts Regional Library System
Rosanna Kowalewski	University of Lowell
David D. Lewis	Plymouth Public Library
Robert Maier	Minuteman Library Network
John Moak	Essex County Cooperating Libraries
Mary L. Pekarski	Boston College Libraries
Vincent Piccolo	Massachusetts Association of Educational Media
Bruce Plummer	Worcester Area Cooperating Libraries
Ann Schaffner	Boston Library Consortium
David Sheehan	Central/Western Massachusetts Automated Resource Sharing
Andrea Shirley	Newton Free Library
Beverly J. Simmons	Merrimac Valley Library Consortium
Richard Talbot	NELINET, Inc.
Ann Wolpert	Special Libraries Association, Boston Chapter

Steering Committee

Margo Crist	Central Massachusetts Regional Library System
Barbara DeYoung	Eastern Massachusetts Regional Library System/Automation Committee
Donald Dunn	Cooperating Libraries of Greater Springfield
Artemis Kirk	Fenway Library Consortium
Joseph Kopycinski	Massachusetts Conference of Chief Librarians of Public Higher Education Institutions
Sylvia A. McDowell	Massachusetts Institute of Technology
Jenny McGee	Massachusetts Health Sciences Library Network
Richard E. Starkey	Western Massachusetts Regional Library System/Automation Committee

FISCAL PLANNING AND SYSTEMS DEVELOPMENT

The Network Plan

On August 11, 1983 the Board of Library Commissioners approved a plan for the establishment of a statewide automated resource sharing network for libraries. The planning document, *Automated Resource Sharing in Massachusetts: A Plan*, sets forth a conceptual framework within which public, academic, school and special libraries can use computer technology to improve their resource sharing efforts.

The plan incorporates two distinct elements:

- 1) the development of computerized circulation/ILL (interlibrary loan) clusters
- 2) the establishment of local Information Network Centers (INCs).

The network will involve existing circulation systems and encourage the development of new clusters in unserved areas. Circulation/ILL systems provide immediate information on materials holdings and current availability status of materials requested by library patrons. Resource sharing efforts are further expanded when the circulation/ILL clusters are linked via telecommunications with each other.

The second component, INCs, will be established to carry out three functions:

- 1) search services - online access to remote databases which will make the resources of such vendors as DIALOG and BRS more accessible to library patrons and staff
- 2) cataloging/ILL services - access to a bibliographic utility which will assist the librarian in creating machine-readable bibliographical records and provide essential interlibrary loan functions
- 3) availability of access to circulation/ILL clusters for libraries not themselves members of clusters.

An INC will employ microcomputer technology and will be a cooperative project of two or more libraries.

In voting their approval, the Commissioners accepted the recommendation of the Automation Planning Committee (APC) and the Statewide Advisory Council on Libraries that this plan serve as the current update for the LSCA *Long Range Program* for Massachusetts. The planning document was developed over the course of a year by the APC which represented libraries of all types.

To support the recommendations of the Plan, the Board of Library Commissioners approved FY1985 budget expansion requests for state funds for establishing Information Network Centers and for six toll-free telephone lines to facilitate dial-up searching of cluster databases from INCs and from other clusters. In their annual legislative package, the Board voted that legislation be filed to a) establish quasi-governmental library networks, b) appoint the Director of the Board of Library Commissioners as an *ex officio* member of the Executive Board of the Massachusetts Corporation for Educational Telecommunications (MCET), and c) expand the capabilities of the regional public library systems (MGL Chapter 78, Section 19C) to make arrangements with non-public libraries for the latter to receive services as provided for in the regions' annual Plans of Service.

Staff spent much of the fiscal year working with the Network Advisory Committee and the Statewide Advisory Council on Libraries to implement the numerous recommendations in the planning document. In addition, they made presentations to library groups in the state and provided information concerning the plan and its objectives through articles in *BLC Notes*. By the end of June 1984 objectives and recommendations from the planning document were taking root throughout the state.

Network Advisory Committee

The Board of Library Commissioners is responsible for the planning and implementation of activities related to the network. Many recommendations concerning the network, such as priorities, use of federal funds for network projects, revising the automated resource sharing plan and others will come from the Statewide Advisory Council on Libraries. However, both the Board and the Council are concerned with matters of a broad nature and are not, on the whole, network participants. When approving the plan, the Board established the Network Advisory Committee (NAC) as a forum for the discussion of issues related to resource sharing and networking.

The Network Advisory Committee, whose membership includes representatives from automated and non-automated libraries and library cooperatives throughout the state, assists the Board on a continuing basis, providing advice and submitting reports concerning the activities and aspects of the network and the plan. The NAC also assists the Board in implementing network activities and by providing evaluations of network objectives through its operations.

Representatives to the Network Advisory Committee include:

1. a representative from each automated circulation/ILL cluster whose computer system can be accessed via dial-up - recommended by cluster members
2. representatives from the Information Network Centers - recommended by the participants
3. two representatives from the LSCA Advisory Council - recommended by the chairperson
4. two staff members of the Board of Library Commissioners - recommended by the Director
5. the administrators of the Regional Public Library Systems
6. the chairpersons of the standing automation committees of the Regional Public Library Systems
7. a representative of the Massachusetts Conference of Chief Librarians of Public Higher Education Institutions (MCCLPHEI) - recommended by the chairperson
8. a representative each from the Massachusetts Library Association, the Massachusetts Association for Educational Media, and a Massachusetts member each from the Boston Chapter of the Special Libraries Association and the New England Chapter of the Association of College and Research Libraries - recommended by their respective presidents
9. a Massachusetts representative from each cataloging/ILL service recognized as such by the Board of Library Commissioners
10. a representative from each of the formally organized library resource sharing consortia or cooperating groups existing in Massachusetts recommended by the chairperson of the consortium or group. Consortia or groups must register with the Library Development Unit of the Board of Library Commissioners.

The NAC met in an organizational meeting on November 15, 1983. Twenty-eight representatives chose a steering committee to draft an organizational structure. The full steering committee met on December 16, 1983, February 6, 1984 and February 28, 1984, with subcommittee meetings in between. The committee's Mission Statement and Operational Guidelines were approved by the Network Advisory Committee on March 26, 1984 and by the Board of Library Commissioners on May 3.

The ongoing functions of the NAC are organized and managed by a nine-member Executive Committee which is selected from specific groupings of member institutions. Two representatives of the Board of Library Commissioners attend and participate in meetings of the Executive Committee as non-voting *ex officio* members. The first Executive Committee will serve through September 1985.

The NAC met for the last time during FY1984 on June 15. After a presentation by the chairman on the organizational structure of the NAC as established in the Operational Guidelines, the working committees met to elect chairs and discuss committee objectives and work schedules.

Data Gathering and Distribution

During FY84, the agency continued to upgrade its capacity to collect and distribute data with the goal of providing future reports more analytical than descriptive in nature.

Staff from the Planning and Research and the Library Incentive Grant Units joined to develop databases and programs which would reduce the amount of manual data-checking necessary when measuring compliance with the Library Incentive Grant Program standards. Results of this major effort are not readily apparent in agency publications but are establishing the basis for future analytic studies and services.

The Planning and Research staff continued to cooperate with the Proposition 2 1/2 Monitoring Project. We provided data to the Urban Institute in Washington, D.C., a project subcontractor.

Increased electronic data-processing capabilities enabled the Unit to continue publishing more information in the *Comparative Public Library Report*. Specifically, for the second year we included the number of hours responding libraries were typically open per week in the winter and summer, the number of hours in the work week to the nearest tenth, and the number of full-time equivalents, excluding CETA staff.

While we do not yet have the flexibility to readily reformat or expand the coverage of the *Public Library Personnel Report*, we were able in FY84 to refine one of its data items. We revised the method of calculating the FTE (the number of paid employees expressed as a full-time equivalent) to improve the accuracy and, in some cases, the comparability of individual and statewide figures.

LIBRARY INCENTIVE GRANT PROGRAM

There were some notable differences between the FY84 and FY83 Library Incentive Grant Programs when one compares data reported at the end of the fiscal year. During FY84, the Board of Library Commissioners certified and awarded Library Incentive Grants to eight more municipalities than it did in FY83. The final count of certified cities and towns was up from 294 (FY83) to 302 (FY84). The Board distributed \$63,551 more in grant money than in FY83 although the total appropriation for FY84 was the same amount - \$2,890,260. Disbursements to municipalities went up from 239 to 243 cities and towns having over 2,500 population, and from 55 to 59 towns with under 2,500 population. The Board denied grants to fewer municipalities. The figure went from twelve denials in FY83 to five in FY84.

The only legislative activity pertaining to the Library Incentive Grant Program was the filing of H3152, a bill further establishing the minimum standards for state grants to public libraries. The bill was introduced to change language in the current legislation, G.L. CH. 78, s. 19B (4) and (5), which further clarified the original law enacted in 1960 under Section 1 of Chapter 760. The bill was intended to amend the language in subsection 4, to read "certified personnel" in place of "trained library worker," and in subsection 5, to read "library materials" in place of "books and periodicals." At the end of FY84, the Board was informed that the bill did not pass.

FY1984 LIBRARY INCENTIVE GRANTS PROGRAM STATISTICAL SUMMARY SHEET

General Information

- 351 Cities and towns in the Commonwealth
- 5 Ineligible to apply: 4 do not have a public library in operation;
1 does not receive municipal funds for public library service.
- 346 Eligible to apply for Library Incentive Grants
- 39 Did not file applications for grants

Applications Filed with the BLC

- 307 Applied for grants during FY1984
- 5 Denied grants by BLC
- 302 Certified and awarded grants
 - 282 - Awarded on basis of meeting all statutes and regulations
 - 20 - Awarded grants after special review by BLC

20 Municipalities Requiring Special Action by BLC

- 13 Hours open regulation (within 90% of meeting regulation)
- 4 Books/periodicals expenditure regulation (1-year waiver)
- 2 Personnel regulation for library director
- 1 Hours open regulation (prorated grants)

5 Municipalities Denied Grants Based on Noncompliance

- 4 Municipal appropriation regulation
- 1 Personnel regulation for library director

Financial Statement - Account 7000 - 9501

\$2,890,260	FY1984 Appropriation
\$2,768,819	Total FY1984 Expenditure

Disbursement to Cities and Towns

\$2,696,227	Payments to 243 cities/towns with over 2,500 population
72,592	Payments to 59 towns with under 2,500 population.

Unexpended Balance in Account 7000-9501

\$121,441	Total unexpended amount
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LIBRARY DEVELOPMENT

LIBRARY SERVICES AND CONSTRUCTION ACT

The effects of Proposition 2 1/2 are not yet behind us. In fact, it will be some time before libraries fully recover. Most libraries still have greatly reduced staff, shorter hours, and book budgets pegged to the same dollar amount as in 1979. Librarians aren't nearly so enthusiastic about starting outreach services as they were just five years ago. Obviously the need is still there, but when libraries barely have enough staff to serve the people coming through the doors, they are not likely to go outside the building searching for new patrons. Improved services to an age group, whether it be children, young adults, or the elderly, appeared to be melded into the ongoing program with little trouble, particularly children's services. Information and referral services, literacy programs, and bookmobiles did not fare as well. Library staff positions covering these areas were the most recently established positions and therefore were the first to be abolished when funds were cut. Without sufficient staff, it is impossible to initiate or continue such services adequately.

In 1983, the National Commission on Excellence in Education made a report to the nation and the U.S. Department of Education entitled *A Nation at Risk: The Imperative for Educational Reform*. To the dismay of librarians, while *A Nation At Risk* recognized the need for lifelong learning, it failed to note that libraries are an essential part of lifelong learning. In August 1983, the American Library Association (ALA) appointed a Task Force on Excellence in Education which responded to this oversight in a statement called *Realities: Educational Reform in a Learning Society*. ALA identified four realities for effective educational reform within a learning society:

1. Learning begins before schooling.
2. Good schools require good school libraries.
3. People in a learning society need libraries throughout their lives.
4. Public support of libraries is an investment in people and communities.

Excepting the examples cited under school libraries, the projects funded under the Library Services and Construction Act (LSCA) are the kinds of activities ALA is pointing out as services which libraries can and should be providing so that America remains a learning society capable of governing itself through the informed participation of its citizens. Librarians have demonstrated a willingness and capability to provide such services. The problem is sustained funding. There needs to be a larger continuing role in the funding of libraries by both the state and federal governments.

At the same time, local governments should not use the receipt of state and federal funds as an excuse to cut back on their own funding. Otherwise, libraries will continue to languish. Congress has some sense of the role libraries can play. But it remains to be convinced of the need for the federal government to assume a larger and more sustained financial role. The Massachusetts state government has recently increased its funding, an action which has mostly resulted in a lesser burden on local government. While the purpose is noble, it does not do much to help libraries which are woefully under-funded.

Public Library Construction

After no funding for nearly ten years, Title II of LSCA was funded by the Emergency Jobs Act (P.L. 98-8). This Act was signed by the President in March of 1983 and funded non-library programs as well. In addition to adding a library construction consultant to the LSCA staff, the agency initiated a competitive grant program for the distribution of the \$929,960 now available for library construction and renovation.

It is interesting to note the influence of LSCA construction monies on public library construction in Massachusetts. The number of requests for assistance in planning increases, regardless of how limited the amount available. Most trustees and librarians realize that they probably will not receive a grant and that even if they do, the greater share of the construction monies will still have to be raised locally. Somehow it is psychologically easier to ask one's community to support architectural fees for a construction project if you can say that there is a possibility of receiving outside monetary assistance. LSCA construction monies have always provided that incentive. No matter how much construction takes place, there are always approximately forty major construction projects which local communities recognize as being necessary. This is probably not that unusual when one considers that there are about 380 independent public libraries and that some of them built at the turn of the century have never been renovated or expanded.



A total of 54 intent-to-apply forms, and subsequently 29 applications, were received in response to the grant program. Provisional grants were awarded to six communities, contingent upon their being able to obtain the necessary matching funding for their projects. Ultimately, only four communities were successful in meeting all the requirements. Milford, Pepperell, Sandwich and Holyoke (the latter an accessibility project) were the recipients.

The grant process unavoidably stretched into the following fiscal year. A Title II program requires considerable adaptability because of the number of program elements that can change at any point during the grant process. These include high bids, no bids, failure to obtain Town Meeting approval for the necessary appropriation, and disputes between local boards in a municipality. Other complicating factors that arise are disapproval of local boards, contractors being disqualified, selection of architects under the state process, and change orders due to unforeseen structural problems. Obviously, a tremendous amount of commitment to the final product is required by all parties involved in the project.

One of the purposes of the Emergency Jobs Act was to distribute the monies as rapidly as possible so that workers would be employed. Although the initial grant awards were made within three months, the process then slowed because communities had to hold special Town Meetings, develop final drawings/specifications, and obtain approvals from numerous governmental agencies. Therefore, the first LSCA Title II project did not begin construction until April 1984 and the last will begin by January 1985. This chronology only highlights the frustration that developed in trying to incorporate the speed required by P.L. 98-8 and the quality and longevity emphasized in the LSCA legislation. However, the end result of four more usable library buildings that will better meet the needs of their communities is rewarding.

The staff consultant increased his own expertise during the course of the year by attending several workshops and seminars on planning for library construction and facilities. He produced several information sheets to be used as guidelines by librarians and trustees as they planned the design of their proposed facilities.

Services to the Disadvantaged

Consulting services to the disadvantaged continued to include those libraries with special populations, such as the limited English-speaking, the functionally illiterate, the elderly and the rurally-isolated. Specific LSCA projects funded this year targeted these groups. The consultant also monitored a grant for an automated information and referral system.

As before, the consultant worked closely with the executive director of Massachusetts Literacy Volunteers of America to continue to provide support and technical assistance for the ten libraries which had started volunteer literacy programs the previous year. In addition, the consultant gave a workshop on grants writing for the national meeting of Literacy Volunteers of America.

Unfortunately, the position of consultant to the disadvantaged became vacant four months into the fiscal year and a replacement was not found for five months. The monitoring of grant projects serving the disadvantaged was assumed by other staff members.

Services to the Disabled

This was a year of transition for the agency's program for the disabled. Without a program consultant from July to January, and with a new consultant from January to June, much of the impetus for program initiatives developed by the previous consultant had to be carried temporarily by librarians in the field.

Promoting the Access Center Library concept, continuing support of the Regional Library for the Blind and Physically Handicapped and the Talking Book Library, and monitoring local production of books-on-tape projects were identified as priority activities for the year.

The first months were devoted to gaining a knowledge of LSCA, of existing library service to the disabled, and of the demographics of disability in Massachusetts. Statistical data on disability estimates broken down by communities and geographic areas of the Commonwealth were sought out and compiled. Applicants preparing final drafts of LSCA grant proposals were counseled also. Of eight projects targeted for the disabled, six were considered fundable with monies from the handicapped program, and two were funded under other categories.

Library field visits and reports on past projects yielded the following program imperatives:

- A critical need to develop adequate evaluation methods of library and information services to the disabled.
- Identification of potential sites for Access Center libraries in communities meeting criteria for population density and disability prevalence.
- Increased efforts to shift direct costs for the Regional Library for the Blind and Physically Handicapped and the Talking Book Library operations onto alternative, stable sources of funding.

LSCA grants approved during 1984 held to the priorities developed and encouraged in previous years. Two libraries proposed to promote reading and communication skills for print-handicapped youngsters and encourage parents to participate in the learning process. One library in particular planned to offer such services to children in surrounding communities in its role as an Access Center Library. Three libraries were engaged in a resource-sharing project for the visually impaired. Two libraries expanded their books-on-tape programs with purchases of duplicating equipment. Another library introduced an imaginative project for its senior citizens, highlighting community resources and activities in an extensive outreach program and expanding the collection of materials usable by print-handicapped elderly.

The Regional Library at the Perkins School in Watertown was unable to install the hardware necessary to accommodate automated circulation system software intended for purchase with 1983 LSCA funds. In consequence, alternative plans were made for the purchase of furnishings and additional shelving in order to accommodate the library's planned relocation and expansion services.

The Regional Library became the focus of considerable legislative interest following the introduction of a bill by consumers designed to strengthen the library's ability to meet its mandated responsibilities. The result was an endorsement by legislators of substantially increased funding to the Massachusetts Commission for the Blind for the administration of the library. This recommended increase also provided a lever for the eventual move of the library to a larger facility by setting aside a reserve fund for "library improvement" based on relocation. The present inadequate setting of the Regional Library has long been a concern of this agency.

The Talking Book Library continued to conduct a viable, highly visible program in Worcester. Plans to move its mail-order operation from the Quinsigamond Branch Library to another soon-to-be-opened branch were delayed by architect's reports that the new site would not meet electrical or load-bearing specifications. At the end of June, the Worcester Public Library and other parties were still in the process of negotiating a workable agreement. Worcester Public Library, the Central Regional System and Memorial Homes for the Blind continue to make substantial contributions to this important service.

In the coming year, the consultant intends to assist and encourage librarians offering services to the disabled in evaluating methods of service delivery. Such activities would broaden the significance of local initiatives and allow them to be worked into statewide program policies. Promoting the Access Center concept and identifying potential sites for designated Access Center libraries (both in terms of community needs and library logistics) will be further objectives for the year ahead.

Services to the Institutionalized

The document *Massachusetts Standards for Patients' Libraries* was adopted by the Massachusetts Board of Library Commissioners on January 5, 1984. These standards provide a detailed quantitative guide for planning, implementation, and evaluation of library service to hospitalized individuals. They are the only comprehensive patients' library standards existing for hospitals providing chronic care to physically ill (disabled) patients. Included in the standards are guidelines for personnel, budget, materials, space, furniture, equipment and services. These standards were intended for use in the development of patients' libraries in the county and state hospitals of Massachusetts. During the first six months after their adoption they were put to direct use in assisting two Department of Public Health and three Department of Mental Health hospitals evaluate and plan for patients' library service.

Nine requests were received for assistance in planning for libraries to serve people who are institutionalized. One of these requests was from the Massachusetts Treatment Center for the Sexually Dangerous which is planning to open a new facility in October 1985. The institution is jointly managed by the Department of Mental Health and the Department of Correction. The residents of this institution have been using the library located within the Southeastern Correctional Center. Plans for the new facility's patients' library have been made in accordance with the newly adopted Standards.

The Fernald State School, meanwhile, decided that it would close its Residents' Library temporarily while the facility undergoes court-mandated renovations. The institution intends to re-open a library for residents in the spring of 1985 and has met with the BLC consultant to develop goals for improving library service to clients once building renovation is completed.

The institution consultant conducted a needs assessment and made recommendations for the Western Massachusetts Hospital, a public health facility that wanted to restructure its library services. Assistance was also provided to the Department of Public Health (DPH) in planning for services of its Central Library. In addition, a presentation on information resource-sharing, planning for library services, and LSCA funding availability was made to DPH hospital superintendents.

The consultant provided assistance in selecting qualified personnel for four institution libraries and in upgrading one existing position in a Department of Mental Health (DMH) hospital library. The Department of Correction created the new position of Statewide Coordinator of Library Services. The consultant assisted in drafting the job description, recruiting, and interviewing applicants for the position. The creation of a statewide coordinator's position represents a major step forward in library services to the incarcerated in Massachusetts. The coordinator will be responsible for the administration of library services in nineteen prison facilities and for providing technical supervision to eleven librarians currently working in Department facilities.

Meeting with DMH Librarians, the consultant helped them develop uniform output measures for their libraries. They began collecting the same data on January 1, 1984. This will allow them to present a departmental report on library services at the end of 1984. In addition, the DMH librarians have requested assistance in developing department-wide library policies and procedures.

A workshop on Burnout Intervention was given at Massachusetts Correctional Institution (MCI) Framingham as part of its in-service training programs for staff. Two workshops were held with approximately thirty participants including correctional officers, teachers, social workers and shift commanders attending.

Six institutions applied for LSCA special project grants. Four of the applicants were successful: MCI Shirley, MCI Walpole, Rutland Heights Hospital, and the Salem Public Library/Essex County House of Correction and Jail.

Non-Print Media Program

The Non-Print Media Unit staff noted an upsurge of interest among Massachusetts librarians in topics related to circulating videocassette collections and programming for cable television. To disseminate detailed information, the staff gave presentations at a special media conference of the New England Library Association (NELA) held at the Framingham Public Library in April 1984. Video technology and legal/copyright considerations involving the use of videocassettes were the topics. The Unit's consultant also gave a talk to a Simmons College class on "Children and Cable TV" and moderated a panel program on performing for cable TV at the NELA annual conference in Hyannis.

Continuing their efforts to provide training and in-service education, the staff conducted 6 workshops throughout the year on the subjects of general audio-visual equipment selection, care and maintenance; 16mm projector operation and care; and video equipment training. These were held for regional, sub-regional, institutional, and local public libraries.

In addition, the consultant worked with other LSCA staff to prepare and present 3 grant-writing workshops for librarians applying for Title I funds.

Five LSCA Title I grants were monitored. One of the most significant media projects was that of the Central Region initiating as a pilot program a large videocassette collection. It is the first circulating collection of its size for public libraries in the state.

Media production was a frequent activity of the Unit. The slide-tape on institutional libraries produced last year was revised and also transferred to videotape so that it could receive wider dissemination via cable TV's local access channels. The slide-tape on 16mm projector care and maintenance was also transferred to videotape for easier viewing and loan arrangements.

Staff assisted the Massachusetts Library Association's public relations committee in getting Boston's Channel 38 to produce a 30-second TV public service announcement for Massachusetts libraries featuring Red Sox star Wade Boggs.

The BLC was again represented on the committee that develops the state audiovisual and microcomputer contracts. The newest feature of the latter was the addition of discounted peripherals so that libraries could expand basic microcomputer systems. Library interest in computers for public use has increased rapidly and there were numerous requests for information.

This was also a year of self-education regarding microcomputer software. The consultant visited several sites for demonstration and examination of educational software in order to become better acquainted with the features of quality software for public use.

STATE LEGISLATION

Library Commissioners' Terms and Conditions of Service

In 1977 the General Court increased the number of Commissioners from five to nine without providing for staggered terms for new appointees. Due to this oversight, six of the nine terms have been expiring every fifth year, a situation that threatens the continuity and cohesiveness of the Board. The bill also included provisions prohibiting library employees or members of library governing boards from serving as Commissioners and provided for the termination of a Commissioner's term following absences from five Board meetings during one year.

This legislation, with some redrafts which designated the number of Commissioners from each Region of the Commonwealth, was reported favorably by the Committee on State Administration and referred to the Committee on Ways and Means where no further action was taken before the legislative session ended.

Non-Residence Borrowing: Reimbursement for Libraries

This bill was a refile to reimburse libraries giving substantial loan services to non-residents. Again this bill requested that, in addition to other existing forms of state aid, an account be established in the amount of twenty-five cents *per capita* (approximately \$1.4 million) to provide reimbursement funds based upon total non-resident loans and non-resident circulation as a percentage of total circulation in accordance with criteria and formulae developed by the Board of Library Commissioners. The bill was reported out of State Administration favorably to House Ways and Means where it remained for the session without further action.

Circulation of Library Materials Within Regions

Since there was no mechanism for the delivery of library materials between public libraries and non-public libraries (school, academic and special), a bill was introduced to enable the regional public library systems to contract with the non-public libraries for the delivery of regional services. The intent of the bill was to encourage document-sharing among all types of libraries. This expansion of the regional book delivery system would be at no extra cost to the state since the contracting non-public libraries would pay for the service. The bill was reported favorably from committee and joined other library legislation in an "Omnibus Bill." The latter was referred to House Ways and Means where no further action was taken during the session.

Quasi-Governmental Incorporation of Library Networks

A bill was filed that would permit libraries of different types to form a quasi-governmental structure for purposes of resource-sharing. Such a network could purchase or lease computer equipment for shared use among its member libraries, conduct debt-financing within the limits of Proposition 2 1/2, and establish itself as a legal entity that would qualify for tax exemption. The bill was reported favorably and referred to House Ways and Means as part of the Omnibus Library Bill.

Additional Aid to Public Libraries

The \$2.5 million in supplemental state aid legislated last year was distributed again through the disbursement ("cherry") sheets. In accordance with the original agreement, one million dollars was appropriated to Boston as the Library of Last Recourse and \$1.5 million was distributed as unconditional state aid, that is, placed in the general fund of each municipality and posted on line 15 of the disbursement sheets under "Additional Aid to Public Libraries." This was certainly a mixed blessing since the municipalities still had the right to disallow expenditure of these monies for libraries and their services.

In this second year of the supplemental aid, the Department of Revenue ruled that despite the apparent intention of the Administration and the General Court that this money be used for library purposes, the funds could not be earmarked for such purposes. Therefore this local aid had to be assigned to general funds to be used for tax relief or any other purpose. It was left up to the libraries in the individual municipalities to speak up for the money and try to exert influence on local officials.

PROFESSIONAL AND REFERENCE LIBRARY

The Professional Library continued to offer a high level of service in support of the agency's programs during this fiscal year. Members of the library staff responded to over 850 reference and information inquiries from both agency staff members and from librarians throughout the Commonwealth. In addition, the staff provided a wide range of other services, such as computer searches, interlibrary loan transactions, and the compiling of bibliographies for agency projects.

Under the supervision of the Head of the Professional Library, the staff continued its efforts to update the library's collection through the selection of current material, withdrawal of outdated titles, and the re-organization of certain information files. Attention was also given the agency's archival collection. Efforts were made to review the collection and to insure that it contained a complete record of all agency publications.



The coordination of operations within technical services and reference services helped to maintain improved acquisitions. Along with a review of several automated acquisition systems, this year we were able to improve the receipt of all incoming library material by utilizing one or two wholesale vendors. An extensive update and weeding of the public catalog progressed in preparation for the agency's relocation. Approximately 50 titles appear on our monthly acquisitions list.

At the end of the fiscal year, Catherine McCarthy, the supervisor of the Professional Library, retired after 40 years of state service. She was dedicated to insuring that the library provided the highest quality library service to the agency, its staff, and to librarians in the Commonwealth. The staff will miss her both personally and professionally.

THE STAFF AND PROFESSIONAL AFFILIATIONS

In addition to their agency duties and often in conjunction with them, members of the staff have worked actively in a number of professional organizations at state, regional, and national levels. Serving in FY84 as officers and/or members of committees were:

Susan Bjorner, Member, Boston Computer Society; author of short reviews of microcomputer books for *Library Journal*.

Mary Burgarella, Chairman, Massachusetts Library Aid Association's Committee on Scholarships.

Brian Donoghue, Secretary, MLA Adult Services Roundtable; member, MLA Program Committee.

Robert Dugan, Member, Boston Computer Society; member, Financial Management Committee of LAMA (ALA) and Publications and Statistics for State Library Agencies Committee of ASCLA (ALA).

Louise Kanus, Member, NELA Media Section; member, State Audiovisual and Microcomputer Contract Committee; BLC representative to the Communications Consortium; member, MLA Public Relations Committee.

Irene Levitt, Member, MLA Program Committee; Planning, Organization and By-laws Committee of ASCLA; Economic Status, Welfare and Fringe Benefits Committee of LAMA; Personnel Administration Section of LAMA.

Mary Litterst, Member, Hospitality and Program Committees of the Special Library Association, Boston Chapter; member, Intellectual Freedom Committee of MLA.

Catherine McCarthy, Member, Boston Group of Government Librarians; member, New England Technical Services Librarians.

Roland Piggford, Member, Board of Directors of the Northeast Document Conservation Center; member, Executive Board of the Regional Library for the Blind and Physically Handicapped; member, Council of State Library Agencies in the Northeast.

Linda Wright, MLA Membership Committee; Chair, NELA Institutional Libraries Section; member, ASCLA Health Sciences Libraries Section - Committee on State and Federally Managed Hospitals and nominating committee of the Library Services to Prisoners Section.